



Take a moment to imagine your life in ten years' time. Think about a realistic but *negative* situation. If you do NOT plan or prepare financially, and if unexpected costs pile up, what will your life look like in ten years?

Home

Where do you live? (Apartment or house? In the city or the country? Which country?)

Do you live with anyone else (roommates, family, a partner or spouse?)

What types of things do you do at home? (Gardening, decorating, reading, fireside chats, other home-based hobbies)

Work & Money

What type of work are you doing? Have you been promoted or retired? Do you work in an office, classroom, or from home?

What type of schedule are you keeping? How many hours? Are you managing others?

What is your salary? Are you participating in a 401K? Are you receiving company benefits or stock? How much have you saved for retirement? Do you have an emergency fund?

Social and Personal

What do you do in your free time? (Hobbies, travel, socializing, etc.)

How would you characterize your close relationships?

What do you do to recharge your spirit?

